

Fact Sheet

Practice Forward™

The Home of the Progressive Firm

Take Your Firm Forward

Thomson Reuters Practice Forward is a consulting and content offering designed to help progressive firms improve margins, drive growth and elevate client service through a combination of innovative and proven business model concepts, backed by the technology leadership and profession expertise of Thomson Reuters.

Is My Firm Ready?

If your firm is forward-thinking with a focus on serving business clients, you're ready for Practice Forward.

What's Included?

As a Practice Forward member you'll have access to an unmatched set of services, including:

- Twelve months' access to the exclusive Practice Forward Central portal, with content and tools designed to help you execute the Practice Forward concepts
- Consulting assistance in the form of one-on-one calls of up to one to two hours per consulting session, depending on the topic
- Tools and content released every two months following completion of the Practice Forward fundamentals to help you continue to move your practice forward (nine additional tools/content releases in total)
- Access to the exclusive Thomson Reuters Practice Forward online Community group
- Invitations to Practice Forward Community webinars featuring Paul Miller and other thought leader practitioners whose firms exemplify the Practice Forward principles, which qualify for CPE credit
- An invitation to the in-person Practice Forward group meeting at the annual SYNERGY Users' Conference

Practice Forward Central: The Heart of Practice Forward

The Practice Forward Central portal is where you'll find the content and instruction to execute the concepts of Practice Forward — an assortment of instructional videos, podcasts, checklists and tools to help you increase not only the clarity of your client relationships, but your compensation for the value you bring to your clients.

Client Engagement Strategy — Engage with your clients the right way, with proposal templates, value illustration tools and content pieces to help you successfully implement an effective method known as the "Two Meeting Approach."

Service Menu — Be clear about the advisory and maintenance services/packages your firm offers with service menu examples and a clearly documented template.

Pricing and Billing — Determine your firm's service menu prices with robust pricing calculators that will help you set your minimum prices, package pricing and monthly client fees.

Sales Opportunities — Focus on identifying existing clients who are suited for the Practice Forward methodology once the structure is in place. You'll receive a presentation tool designed for interactions with prospective clients.

Client Facing Tools — Jump-start your advisory services offerings with these tools, which include an assortment of presentations, discussion points and calculators.



PRACTICE FORWARD CUSTOMERS SPEAK:

"Practice Forward has made my work life easier because now I'm more focused on sales and marketing rather than just grinding out tax returns. Part of the Practice Forward metamorphosis for me has been that it caused me to hire the staff I need. I used it as a catalyst to go forward, and it's helped. This time last year I was buried. Early tax season this year was horrible until I got started with more Practice Forward strategies and also got some additional staff on board."

— Dale Jacobson,
Kenneth Dale Jacobson, CPA, PLLC

"I would highly recommend Practice Forward to any firm that is looking to develop a tighter bond with their clients and really work as a business adviser. The clients that we've brought on as a result of implementing Practice Forward have become more engaged and they work with us very regularly."

— Mark Martukovich,
FMA, CPA



The Practice Forward Path

The value of Practice Forward doesn't stop with the fundamentals; your path to a more progressive firm continues with new content and tools.

Once you've finished your Practice Forward Fundamentals consulting sessions, you'll receive a new section of content every two months. Each content release will focus on a specific concept designed to help you build on the fundamentals.

The graphic below will give you an overview of the nine content releases you'll receive.



For more information about Practice Forward, call us at **800.968.8900**.

